Note for Keane, Denise

2041242910

From: Keane, Denise

Date: Fri, Oct 8, 1993 5:05 PM

Subject: RE: RECORDS MANAGEMENT PROJECT

To: Purcell, Clare

BOY, IS THERE A FINE LINE BETWEEN A DREAMER AND AN OPTIMIST.

From: Purcell, Clare on Fri, Oct 8, 1993 2:44 PM
Subject: RECORDS MANAGEMENT PROJECT
To: Keane, Denise; Murphy, Virginia

In an effort to put some hard and fast deadlines on our neverending program at H&W, I have had a series of conversations with Lewis Cummings, Bill Lynch and Pat Elliot. The situation as it is, consists of the following:
The New York consolidated schedules were never delivered to the client areas because we were waiting for Bill Lynch to 1) conduct an inventory of all areas and 2) get a computer system that can take the schedule maintenance from H&W. Due to budgetary and staffing restraints, neither of these can be completed before next spring. When the new schedules are delivered, we can expect some changes, modifications, deletions, etc. The categories which we have designated for company records, however, cannot be substantively changed. This is because the tool created for our use in Legal Clearance (the binders) is based on the existing consolidated category names.

Here is a new plan which Bill Lynch has agreed to. It is a responsible approach from the viewpoint of PM support and H&W support. Bill will establish departmental contacts within the next two weeks to implement the new NY schedules. (I have offered Legal Department help if he needs to get some one in a department who can do it effectively.) Without waiting to do an inventory of every department, we will push that burden on the departments by rolling out the new schedules.

Bill, Pat Elliot and I will need to walk through the logistics of delivering the new schedules (how to deal with stored files under old category names, etc.). By the second week of November, we will hold one training session where each of the NY contacts is advised of their responsibility to implement the schedules for their area, and get departmental signatures on the schedules by December 15th.

H&W will make any adjustments to the schedules (and the Legal Cite charts, if necessary) until all NY schedules are finalized. This hopefully will be by year end (maybe a little into January.) At that point, they can run historical trail reports of what records were called under old schedules and what they are now. They can turn over the data to Lewis Cummings (who should have relatively no maintenance to do as the schedules will have just been finalized.) And from that point forward, any maintenance of schedules will be done by me, based on the legal citation charts. (Although, I think we should consider a NY paralegal maintaining the NY charts based on the binder--it should be easy enough. I will muddle through Richmond, which has not been consolidated, and look for opportunities to streamline categories that won't require rewriting the binders.)

2041242910A

Source: https://www.industrydocuments.ucsf.edu/docs/mplx0000